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(Tantum eruditi sunt liberi)

Maintenance Jobs.....	3
Add a Job	3
Printing Job Sheets	3
Manage All Jobs.....	3
Set Next Action Date.....	4
Manage Jobs by Property	4
Manage Jobs by Contractor	4

Maintenance Jobs

Add a Job



There are various places within the system where you will be able to add jobs, but if the job you are adding is ad hoc then follow this procedure.

Using the standard search criteria find your property to add a job to by selecting Branch, Area, Street Key Bunch or if you have a reference type in that then click **Next**

In the next screen using the drop down menus select the status priority and type of job. Click on the **Edit** button to add the contractor that you want to assign the job to, tick the access with keys box no appointment if required. Next you will need to enter the details of the job (mandatory). Please try and be as comprehensive with the details as possible. When complete click **Finish**.



Note: Job Status list can be customised in Control Panel/Object Types

Printing Job Sheets

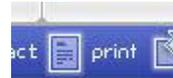
To print out the job sheets got to either:

- Manage all Jobs
- Manage Jobs by Property
- Manage Jobs by Contractor



By choosing one of the above methods you should see a list of jobs applicable to that heading.

Click on the edit button of the job you want to print, this will bring up the job details screen. Click on the Print option at the top right of the



Then click on the Print Maintenance Job button on the following screen.

This action will download a pdf file of the job with all details attached.

You can now print out this job sheet for your contractor to collect or you save a copy to your pc and using the email function in the InTray, send a copy to the contractor

Manage All Jobs

Once you have added a job and given it to your contractor you will need to follow its' progress. Selecting Manage All Jobs will take you to the facility to manage all jobs for your branch, or Jobs by Contractor, Jobs by Property and



Created At	Property	Description	Next Action Date	Priority
08/05/2008	17 Anfield Road, d42 5e...	Broken handle on back door. unable to lock the door		High

The filter list can be set to target specific jobs. Using the drop down menus you can select specific job type or all types, Status; Reported Actioned or Closed. Priority, Low Medium, High or Show all. Created, set how far back you want to look at jobs or select all and finally if required select what branch the job is

for. You will then be shown a list of jobs to suit your criteria.

You can now edit a job by clicking on the **Edit** button. In the edit screen there are two tabs one for the job details and the other tab is to add any notes to the job. For progressing a job, change the Status, Priority and Type as required. Contractors may also be changed if required.

Set Next Action Date

It is possible to set a next action date and comment on a maintenance job. This can in turn be used to set the next 'chase-up' date. For example set for the day the contractor is due to visit the property.

Select Manage all Jobs and click on the edit button to open the job required
In the next action date details set the date required

Add a comment of the action to be carried out and click the Add button

Once you have carried out the action on the date set and you wish to add another action carry out the same process. This will over-write the old date and comment but a copy of the old Next Action Date and Comment is added to the Maintenance Job Notes (for audit purposes).

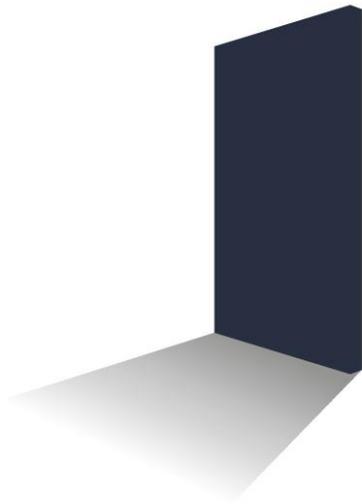
The Manage All Jobs selection can be filtered by jobs with a Next Action Date over a selected period of time.

Created At	Property	Description	Next Action Date
17/02/2009	4 Counlisbury Avenue, CF...	Boiler broken	12/05/2009

When a job has been completed, remember to change the status to Closed. This will remove the job from the list. To review closed jobs at any time set your search criteria when managing jobs to Status Closed.

Manage Jobs by Property Manage Jobs by Contractor

Managing Jobs by Property and Managing Jobs by Contractor go through the same process as Manage all Jobs, except that your search criteria will be looking for properties and contractors respectively.



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